

Holdings Summary

Total Holdings \$109,785.86 | Day Change **-\$518.20 (-0.47%)**

Unrealized G/L **+\$9,785.86 (+9.79%)**

Summary Holdings Fundamentals Performance Performance BUS-123 +

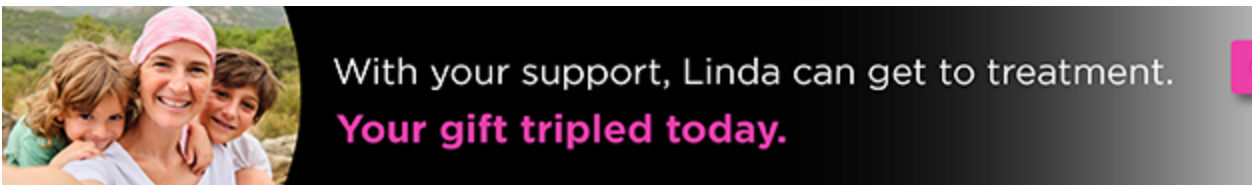
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Symbol	Company Name	AC/Share	Last Price	Market Value (\$)	Tot Gain UNRL (%)
BX	Blackstone Inc.	137.12	188.42	13,741.25	+37.41%
CVX	Chevron Corporation	138.56	153.87	11,104.94	+11.05%
FDX	FedEx Corporation	283.04	283.42	10,013.43	+0.13%
JPM	JPMorgan Chase & Co.	212.46	239.94	11,293.42	+12.93%
MSFT	Microsoft Corporation	401.70	447.27	11,134.43	+11.34%
NKE	NIKE, Inc.	80.63	77.25	9,580.80	-4.19%
PKG	Packaging Corporation of America	201.81	238.10	11,798.23	+17.98%
SJM	The J. M. Smucker Company	120.27	113.53	9,439.59	-5.60%
V	Visa Inc.	279.37	314.74	11,266.06	+12.66%
WM	Waste Management, Inc.	204.73	213.20	10,413.72	+4.14%

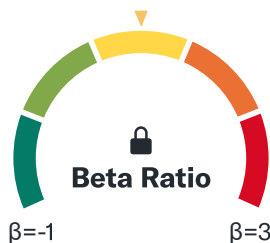
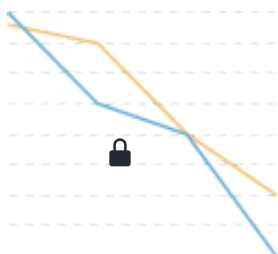


Risk Analysis

2024 Fall Introduction to Investments Class

S&P 500

View History



Overvalued	7
Near Fair Value	3
Undervalued	0

Volatility is a formal measure of a stock's risks. The higher the volatility of a stock, the greater its up and down swings.

Beta represents the tendency of a portfolio's returns to respond to swings in the market.

Valuation

Fair value analysis provides an intuitive view of a company's fair market value to help you invest with confidence.



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